



Windows Mobile Customer Solution Case Study



Customer: Adelaide Bank
Web Site: www.adelaidebank.com.au
Customer Size: 5,000+
Country or Region: Australia
Industry: Financial Services-Banking

Customer Profile

Adelaide Bank sells financial products and services to individuals and businesses. Operating from its headquarters in Adelaide, Australia, the bank has over A\$26 billion (U.S.\$23 billion) in assets.

Software and Services

- Products
 - Windows Mobile® 5.0
 - Microsoft Exchange Server

Hardware

- Windows Mobile-based Devices
 - i-Mate SP5
 - i-Mate K-Jam

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www.microsoft.com/casestudies

Wholesale bank enhances customer service with technology-equipped mobile workforce

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Rob McKeon, General Manager Information Services, Adelaide Bank

Adelaide Bank is a wholesale bank serving clients across Australia. With assets of A\$26 billion (U.S. \$23 billion) in 2006, it sought to expand its customer base. By deploying Windows Mobile® 5.0 to its staff, the bank has improved its offsite client services by delivering real-time banking information. And staff reports greater efficiency, improved productivity, and better work/life balance thanks to remote e-mail access.

Business Needs

Adelaide Bank provides financial solutions to individuals and businesses through its distribution network and partners across Australia. Founded in 1994 with its headquarters in South Australia, it has expanded into new regions, with over 75% of its loans now originating from outside South Australia. This asset base amounts to over A\$26 billion (U.S. \$23 billion), making it one of the largest publicly-listed banks in Australia.

To continue growing, Adelaide Bank needed to increase its customer base and asset holdings. The bank recognized that a key area for improvement was its client services.

However, Adelaide Bank is in a unique position. Its mobile workforce is often the clients' first point of call for information, making it imperative for the bank to upgrade the IT operations supporting its mobile workforce.

“We recognized the need to make significant changes and upgrade our technology infrastructure, as it plays a central role in ensuring that all employees have access to the most up-to-date information for both our current and potential customers,” says Rob McKeon, General Manager Information Services, Adelaide Bank.



Adelaide Bank required a solution that provided remote access to real-time updates on the bank's products and services as well as access to e-mail messages while mobile staff visited clients.

Solution

After investigating a variety of leading-edge mobile solutions, Microsoft Windows Mobile® 5.0 was chosen for its robust security, simplicity, range of available applications, and multiple upgrade options. Simplifying daily operations was the key objective.

The Windows Mobile 5.0 implementation was part of a bank-wide installation of a Windows desktop and server operating environment. This installation involved moving from a mixed Windows and Novell environment to a pure Microsoft environment. The installation of the initial Microsoft® Exchange Server Email and Device Management Pack was handled by HP.

More than 250 Windows Mobile-powered devices (predominantly i-Mate SP5 and K-Jam handhelds) were rolled out and adopted by Adelaide Bank employees. Mobile staff now have access to up-to-the-minute financial data and banking services to their clients. Staff can also access e-mail, calendar, and the Internet, thus improving productivity and saving time.

Benefits

Adelaide Bank realized the benefits of the mobile solution immediately. The bank now functions more efficiently, with increased staff productivity and improved work/life balance. In addition, Adelaide Bank's growth objectives are being met through its streamlined and responsive mobile team.

■ Improved staff productivity

The mobile platform has transformed the mobile bank staff. Real-time updates and remote e-mail and Internet access has accelerated communications and improved overall productivity. "Our mobile workforce is more productive because the mobile technology saves them travel time to-and-from the office. It also ensures they have the latest information on our banking products and services when they visit brokers and partners," says McKeon.

■ Higher levels of job satisfaction

With increased convenience, staff feels that it is easier to accomplish its tasks. This has led to more job satisfaction. "One of the biggest bonuses (of mobile technology) is the improvement in our employees' work/life balance. People no longer need to return to the office on a regular basis, which enables them to work smarter while allowing them to reclaim some of their personal time," says McKeon.

■ Security

Security is central to every business, but is especially critical in the financial services sector. The new mobile solution has a unique method of safeguarding information if it falls into unauthorized hands. "Each device has what we refer to as a 'kill pill'. This function allows us to immediately wipe all information off of a device if it becomes lost or stolen. The 'kill pill' gives our IT team, senior management, and remote users the peace of mind to help do their job effectively," adds McKeon.

■ Supports growth

With a more responsive workforce, Adelaide bank can achieve its growth objectives with greater ease. "Giving our field workers access to important information on services, rates, and loan updates has proven to be a competitive tool for Adelaide Bank as we expand our network across the country," says McKeon.